

Want to generate more business in less time?

We understand retirement, and how important it is for you to be able to provide solutions for your clients in an ever-demanding world. And we know that means quicker, easier and more streamlined solutions.

With this in mind, we're proud to announce the launch of our all-new Life Annuities and Investments Quote System that lets you manage your quotes more efficiently. The new web-based system replaces the Office Quote package and is available via Sanport.

Key features

- **Manage** – You can create, update and search client details from a central point. Thanks to automatic data capture you don't have to re-enter existing client information when opening a new quote – it's stored automatically. Rates are also updated automatically on the web system every week.
- **Create** – Enter your clients' investment details and select their policy options, allocate income payment terms and growth percentage rates. You're able to make adjustments along the way without generating a new quote.
- **Generate** – Once the information is captured, you can generate the quote and product summary. You automatically receive a downloadable PDF proposal to share with your client.
- **Submit** – Coming soon: Our next improvement in this process is to develop a feature whereby you can download and submit an application form for your client to sign electronically.

We truly believe our new Quote System will help to make your admin processes easier – leaving you with more time to advise your clients - and also make it easier for you to do business with us. Thank you again for your ongoing support.

Click [here](#) to access more information – watch our tutorial video, listen to a podcast or download a brochure and other instructional material.

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